

Adopted: September 2001 , Revised: _____

Class Title: Executive Secretary Retirement Systems

BRIEF DESCRIPTION OF THE CLASSIFICATION:

Performs as system administrator. Coordinates and oversees the management and investment of the system's assets, supervises the system's professional and clerical support staff and ensures the Board of Trustees' policies are implemented.

ESSENTIAL FUNCTIONS:

This information is intended to be descriptive of the key responsibilities of the classification. The following examples do not identify all duties performed by any single incumbent. Specific requirements of individual positions are described in the Job Description.

	Physical Strength Code	ESSENTIAL FUNCTIONS
1	S	Serves as secretary to the Board of Trustees by implementing board policies, attesting to the actions of the board, collecting the city pension contribution to the retirement system, overseeing the retirement system's budget and preparing board and committee minutes, meeting agendas and reports.
2	S	Monitors activities of the retirement system's service providers by reviewing custodial statements, reviewing reports of the investment consultants and investment managers, and overseeing the annual actuarial valuations.
3	S	Functions as a specialist on retirement matters by counseling participants and beneficiaries of the system, serving as the city's plan and benefit interpretation specialist on retirement and related matters, and as the retirement system's liaison with the pension fund industry.
4	S	Serves as the retirement system's chief administrator by overseeing the preparation and distribution of annual reports, monitoring federal and state legislation that may impact the system, coordinating accounting systems relating to pension contributions, payments and investments.

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CLASS REQUIREMENTS:

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Formal Education / Knowledge	Work requires broad knowledge in a business professional field. Knowledge is normally acquired through four years of college resulting in a Bachelor's degree or equivalent.
Experience	Five years experience in Accounting.
Certifications and Other Requirements	N/A
Reading	Work requires the ability to read various reports, surveys, codes, data, minutes, professional journals, and related materials.
Math	Work requires the ability to perform complex math calculations, addition, subtraction, multiplication, division and accounting functions.
Writing	Work requires the ability to write reports and correspondence.
Managerial	Managerial responsibilities include planning and overseeing programs, presentations, and daily operations.
Budget Responsibility	Oversees budget preparation of bureau budget and reviews and approves expenditures of significant budgeted funds for the bureau and may research and prepare recommendations for city-wide budget expenditures.
Supervisory / Organizational Control	Work requires supervising and monitoring performance for a regular group of employees in a work unit including providing input on hiring/disciplinary actions and work objectives/effectiveness, and realigning work as needed.
Complexity	Work is widely varied, involving analyzing and evaluating many complex and significant variables. City-wide policies, procedures, or precedents are developed and/or recommended.
Interpersonal / Human Relations Skills	Contacts others within the organization. These contacts may involve similar work units or departments within the City which may be involved in decision making or providing approval or decision making authority for purchases or projects. In addition, these incumbents work with individuals outside the City who may belong to professional or peer organizations. Working with various state and federal agencies may also be required of the employee.

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OVERALL PHYSICAL STRENGTH DEMANDS:

Sedentary	X	Light	Medium	Heavy	Very Heavy
S = Sedentary Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time		L = Light Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree.	M = Medium Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly.	H = Heavy Exerting 50-100 lbs. occasionally, 25-50 lbs. frequently, or up to 10-20 lbs. constantly.	VH = Very Heavy Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly.

PHYSICAL DEMANDS:

C = Continuously 2/3 or more of the time.	F = Frequently From 1/3 to 2/3 of the time.	O = Occasionally Up to 1/3 of the time.	R = Rarely Less than 1 hour per week.	N = Never Never occurs.
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This is a description of the way the job is currently performed; it does not address the potential for accommodation.

PHYSICAL DEMANDS	FREQUENCY CODE	DESCRIPTION
Standing	O	Presentations, fax machine, copier, filing
Sitting	C	Computer, desk work, answering telephone, meetings
Walking	O	To/from office equipment, to/from meetings
Lifting	F	Office supplies, files, reports, paper
Carrying	F	Office supplies, files, reports, paper
Pushing/Pulling	O	Chairs
Reaching	O	Across desk
Handling	F	Office supplies, files, reports, paper
Fine Dexterity	F	Computer keyboard, writing, telephone keypad, calculator
Kneeling	N	
Crouching	O	to lift boxes
Crawling	N	
Bending	R	Filing in file cabinet drawer
Twisting	N	
Climbing	N	
Balancing	N	
Vision	C	Computer, deskwork, reading, writing, filing
Hearing	C	Staff, supervisors, clients, telephone, meetings
Talking	O	Staff, supervisors, clients, telephone, meetings
Foot Controls	N	
Other (specify)	N	

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MACHINES, TOOLS, EQUIPMENT, AND WORK AIDS:

Check folding machine, adding machine, fax machine, copy machine, shredder, computer, Standard Microsoft Windows and Office software, laser or inkjet printer, PeopleSoft, Pension Software, telephone

ENVIRONMENTAL FACTORS:

D = Daily	W = Several Times Per Week	M = Several Times Per Month	S = Seasonally	N = Never
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HEALTH AND SAFETY		ENVIRONMENTAL FACTORS	
Mechanical Hazards	N	Dirt and Dust	N
Chemical Hazards	N	Extreme Temperatures	N
Electrical Hazards	N	Noise and Vibration	N
Fire Hazards	N	Fumes and Odors	N
Explosives	N	Wetness/Humidity	N
Communicable Diseases	N	Darkness or Poor Lighting	N
Physical Danger or Abuse	N		
Other (see 1 below)	N		

PRIMARY WORK LOCATION	
Office Environment	X
Warehouse	--
Shop	--
Vehicle	--
Outdoors	--
Other (see 2 below)	--

- (1)
- (2)

PROTECTIVE EQUIPMENT REQUIRED:

None

NON-PHYSICAL DEMANDS:

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NON-PHYSICAL DEMANDS	
Time Pressures	F
Emergency Situations	R
Frequent Change of Tasks	F
Irregular Work Schedule/Overtime	F
Performing Multiple Tasks Simultaneously	F
Working Closely with Others as Part of a Team	F
Tedious or Exacting Work	F
Noisy/Distracting Environment	N
Other (see 3 below)	N

- (3)